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Advertising Age

50 YEARS 1930-1980

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Top agency execs read signs of recession

An Advertising Age roundup

Though indications are that the long-awaited recession finally has begun to make its appearance, some agency executives say they can't find hide nor hair of it.

A number have adopted a see-no-evil, feel-no-evil attitude but others believe the prevailing economic winds contain cold breezes that may soon turn to icy gusts.

The signs include some softening among various media (AA, April 14). Ad pages have begun to slip for some areas of the business and consumer press, some newspapers cite dips in local advertising and, in some markets, radio has found the going tough.

Other preliminary signs of an economic shift include the movement of dollars from marginal to lead brands and a growing number of advertisers who are keeping their media plans flexible.

The recession "has started its squeeze," said Doyle Dane Bernbach chief Neil Austrian in New York. "Some budgets are being cut back, not significantly yet, but it is a trend." Mr. Austrian, a former Wall Street financial man, would not say how deep the cuts were nor which accounts were affected.

But he did admit that the elements coursing through the economy today have him worried. "A slowdown with interest rates of 20%? We've never seen a situation like this in American history, ever," he said. "We're looking at a major credit crunch which should be followed by a drop in spending and purchasing ability. Then advertisers will have to make some decisions." He expects this will occur in the second quarter.

At Interpublic Group of Cos., chief Philip H. Geier Jr., who earlier cautioned that 1980 profits may not be as dramatic as those of 1979, said that so far there have been no cuts. But, he said, he hears talk that some advertisers may move money from "behind marginal brands to leaders," and also may "sharpen their already sharp media buying pencils."

Despite research to show that ad expenditures actually grew in three of the past four recessions, and that marketers who kept their ad weights up when the gross national product went down came out winners, and even surveys that show that today's advertisers are believing and acting on these findings, the agency execs admit to growing unease.

"We're not getting any recession-inspired cuts, and no patterns attributable to a recession are emerging yet," said John E. O'Toole, president of Foote, Cone & Belding Communications. "There's no doubt that these are perilous economic times, and everybody's watching developments like crazy."

Those sentiments were echoed by the largely financial-oriented Doremus & Co., as well as J. Walter Thompson Co. and BBDO.

• Ogilvy & Mather chief William Phillips hasn't seen a hangman yet, but he has seen signs of the gallows going up in the marketplace. "We're seeing some selective budget cuts here and there, but for the most part the consumer products which we're very strong in are unaffected by economic swings."

The O&M chief noted that "a small number of clients for whom advertising is less directly related

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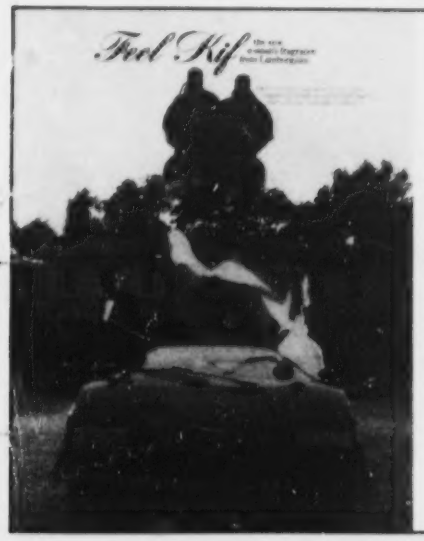

The spirit of Kif

Parfums Lamborghini, New York, envisions the spirit of Kif, its new women's fragrance, with this color ad from Waterman & Trainello. Ad schedule is weighted heavily for fall.

Credit cards start to unsell

By JOSH LEVINE

NEW YORK—With unrestrained use of credit nudging out gas guzzling as the nation's No. 1 consumer crime, Visa USA and Interbank, MasterCard's licenser, have joined oil companies in the ranks of advertisers whose primary task is unselling the products they market—at least for now.

Since March 14, when federal regulations put credit card use on an anti-inflation enemies list, Visa has been trying to dispose of the network time it had bought earlier for a "heavy duty" summer campaign.

Interbank opted instead to replace the broadcast spots it had scheduled for its own campaign with a 30-second message from Russell Hogg, Interbank's president. In the new commercials, created by William Esty Co., Mr. Hogg soberly urges MasterCard holders to limit use of the card to "necessities and emergencies."

At the same time, issuers of the three top travel and entertainment cards—American Express, Diners Club and Carte Blanche—regard the summer hibernation of the two bank card licensers and the banks that issue those cards as an opportunity to snare new cardholders. Issuers of t&e cards, as they are known, are bound by the current federal restraints, but the heavy skewing of their cardholder base toward business customers and their nonissuance of revolving credit reduces the impact.

In the case of both Visa and Interbank, the recent advertising shifts were carried out at the behest of member banks, which are taking whatever steps they can to deflate unprofitable charge card volume.

Even before the March 14 anti-inflation program, the high cost of

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Campbell-Ewald unit wins bidding

Paris store auctions ad budget

By CAROLYN PFAFF

PARIS—In a move without precedent in the French marketplace, the troubled department store chain Manufrance has just auctioned off its 1980 ad budget of $5,250,000 to Publi-Service/Campbell-Ewald in return for a $1,000,000 investment in the company.

Thus the Interpublic agency in Paris, which recently suffered a dramatic $10,000,000 drop in business, becomes a stockholder in a chain of 80 stores that last year lost FF33,500,000 ($7,950,000).

In fact, Publi-Service was one of 10 agencies approached by the management of Manufrance to help save a desperate situation. None of the other agencies approached, including the big French agencies, was interested in investing the required amount, although eight asked to bid on the ad budget.

Manufrance employs 1,925 persons and has been in serious financial difficulties on and off for five years. It was restructured last year with a new president and new stockholders but it has been unable to secure more necessary cash from the banks. In recent weeks, it has had difficulty meeting its payroll.

The Campbell-Ewald participation has been prominently played up in French newspapers under the title: "The American advertis-

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last minute news

Firestone names BBDO; spending drop expected

AKRON, O.—Firestone Tire & Rubber Co. has named BBDO, New York, as its agency, effective Nov. 1, with responsibility for passenger tires, automotive services and corporate image advertising, previously handled in-house and by Murray & Chaney Advertising, Hudson, O. Murray & Chaney continues as the agency for truck, farm and off-highway tires. Firestone reportedly spent $20,000,000 on advertising last year, but that figure is expected to decline. Work on a one-year campaign for Firestone's 721 tire by James Jordan Inc., New York, has been completed.

Sony reportedly talking to agencies

NEW YORK—While Sony America denies it is considering an agency switch, its consumer products division reportedly has been in contact with Young & Rubicam, Doyle Dane Bernbach, and Wells, Rich, Greene to determine each agency's interest in the $10,000,000-plus account, which went to McCann-Erickson from DDB early last year.

Adams expected to replace Hesse at Four A's

WASHINGTON—Charles F. Adams, retired president-chief operating officer, D'Arcy-MacManus & Masius, reportedly will be named Washington representative of the American Assn. of Advertising Agencies, succeed-

(Continued on Page 8)

'Unfair' out as FTC bill nears

WASHINGTON—Senate and House negotiators were reported moving last week toward agreement on legislation which clips "unfair" from the Federal Trade Commission's rulemaking jurisdiction over advertising, and establishes a two-house veto over any rules the commission issues.

Defying hints of an impending presidential veto, the formula developed by the Senate commerce committee leadership also restricts FTC's power to regulate funeral directors, agricultural cooperatives, life insurance, trademarks and standards-writing organizations.

Threats of a veto do not appear to upset Sen. Howard Cannon (D., Nev.), the Senate commerce committee chairman, who calls the bill "balanced and responsible." House leaders are not commenting, but there are signs agreement is near.

• The White House has indicated that a two-house veto is less objectionable than other restrictions proposed for FTC, but that the President will veto a bill which "substantially weakens" the commission. Since FTC's funds run out April 30, the congressional message to the President is that his veto might put FTC out of business.

Ad industry associations are particularly interested in sections of the formula which limit FTC ad rules to "deceptive" ads, instead of "unfair or deceptive." The change knocks out the proposed rule on children's advertising, and reassures cigaret industry executives who fear "fairness" could become the basis for future action against their ads.

"Unfair or deceptive" would remain as a basis for individual cases. FTC would also have power to use "unfair" for rules against tv ads to children for "a product found by a federal agency with jurisdiction over the product to be unsafe." ■

NEWSPAPER
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CONGRESSIONAL INFO SERVICE
7101 WISCONSIN AVE
WASHINGTON DC 20014

50 sponsors await alternate fare

NBC mulls Olympic fill-in

By JAMES P. FORKAN

NEW YORK—NBC boss Fred Silverman is looking for the programing momentum to enable NBC-TV to keep its Moscow Olympics sponsor and ratings losses to a minimum.

Although NBC has leaked word that it is discussing "alternate advertising plans" with the 50 or so Summer Olympics accounts—thereby confirming what agency execs had long been anticipating (AA, Feb. 25)—the network officially is keeping quiet lest it jeopardize its Lloyds of London insurance policy.

Under terms of the policy, NBC would recover 90% of its $87,000,000 investment if the games are cancelled, terminated in progress, or if the U.S. team does not go.

NBC feels it should say nothing formally till the late May deadline when the U.S. Olympic Committee, which has voted not to send U.S. athletes, must inform the International Olympic Committee of its intentions. (When the insurance policy was written, fears that the 1980 Olympics might be a victim of U.S.-U.S.S.R. cold war friction stemmed from the Jewish dissidents' problems in Russia several years ago.)

After an Olympian sales effort that brought in more than $170,000,000 in sales for the 152 hours of coverage spanning July 19 to Aug. 3, NBC now must scramble for replacement fare without "going overboard" and advancing titles that might help in the fall Nielsen wars, some sources noted.

The "skeleton plan" NBC unofficially is giving inquiring agencies for the 67 hours of prime time Olympics substitutes calls for regular programing in the 8 p.m.-to-9 p.m. slot and movies and first-run long-form fare every night after 9 p.m. No titles are mentioned as definite.

Some affiliate sources indicated

(Continued on Page 84)

Futuristic conditioner

Newspaper insert for Clairol's new Small Miracle conditioner states it is a "big advance" in conditioners because it "works through 3 shampoos." National introduction is set for June tv support (AA, April 7); Foote, Cone & Belding, New York, handles. This insert ran in Green Bay and South Bend recently

CBS' Daly looks to fall with confidence

By COLEY COATES

NEW YORK—CBS Entertainment president Bob Daly plans two ratings victory parties this week. Then it's back to the screening room to resume the nonstop dash to May 1, the day CBS unveils next fall's prime time schedule.

Going into the final weekend with a razor-thin ratings lead, Mr. Daly last week suggested that "whatever the manner of judging, we've taken the position that we've won. We overcame the World Series, the Olympics, everything they threw against us."

At this point, CBS' top programer claims to have a better notion of who shot "Dallas" bad guy J.R. Ewing than the new schedule's makeup.

"We're at least a week away from having any strong feelings about the new schedule," he said. "Most of the pilots of our new properties are just being delivered now. Although we're very encouraged with much of what we know about the new properties, we haven't reached the point of pulling the schedule together."

• So while there are plenty of question marks about the 40 or so projects that are fall candidates (but have still to face any kind of prime time test), there is no confusion about the strategy CBS will employ next fall.

"I've become a firm believer in nurturing the viewing habit. I just don't think it's healthy if the viewer has to keep going back to a tv listing to find out what's on," he continued. "I can't say that our big nights (Sunday, Monday and Friday) will stay exactly intact, but the likelihood is that they will."

Although looking to "strengthen" Tuesday and Wednesday lineups, Mr. Daly ruled out any major shuffling "that would break up our present strength." Likewise, the CBS exec promises to resist further sweeping changes once ABC and NBC release their schedules, pledging not to "rip our schedule apart."

Even though Mr. Daly has been an advocate of a less rigid new show introductory process—and has even posed the possibility of premiering new programs either in late summer or after the baseball playoffs and World Series—upcoming plans depend on how many new programs are taped and how many are on film. Moreover, deep

(Continued on Page 84)

Mello Yello closing on Pepsi entry

ATLANTA—The next major marketing battle between archrivals Coca-Cola Co. and Pepsi-Cola is breaking out on the citrus-flavor drink front as Coca-Cola rolls out Mello Yello into more than 50% of the country by next month.

David Reddick, national brand manager for Mello Yello, said he expects his brand to overtake Pepsi's Mountain Dew by the end of this year.

He said the brand, touted as the "world's fastest soft drink" in advertising, ended 1979 with a 0.6% market share despite its limited distribution. If it had been national, its share would have been 2%, compared with the 2.4% share chalked up by Mountain Dew, according to Mr. Reddick.

In one major new market, New York, advertising begins running at a $20,000,000 annual national rate this week after some limited airing of tv spots during the last two weeks. In addition to commercials that ran in other markets earlier, Coca-Cola has filmed new spots showing athletes in a Mello Yello chugging contest.

Special ads have also been created for major markets. For example, transit and outdoor ads in New York note, "You've gotta be fast to make it in New York." McDonald & Little is the Mello Yello agency. BBDO handles the Pepsi entry. #

Gillette puts Swivel into razor warfare

By LOUIS A. FANELLI

ANDOVER, MASS.—Gillette Co. will mount major advertising drives for a disposable razor called Swivel and a self-adjusting shampoo called Silkience this year.

Swivel, a pivoting-head, disposable razor patterned after Gillette's highly successful Atra razor, will make its debut during the July 8 All-Star baseball game. For the introductory period, Gillette will be spending at an $11,000,000 annual rate for Swivel. Benton & Bowles, New York, handles Swivel; the agency already has Gillette's disposable Good News! razor.

Silkience shampoo (AA, Dec. 31) follows the tresses of Silkience conditioner, which was introduced last year by Gillette's personal care division. Gillette will spend $19,000,000 in promotion and another $10,000,000 in advertising when its Silkience shampoo campaign breaks June 30. That's the biggest budget ever for a shampoo in Gillette's history. Advertising to Women, New York, handles the Silkience line.

The new shampoo is called self-adjusting because it's formulated to clean hair where cleaning is needed and condition where hair is dry.

• Promotional plans of both products were revealed by Gillette at its annual meeting here last week.

Swivel marks Gillette's third entry into the men's disposable razor field. It joins Good News!, the largest-selling disposable, and the Gillette Single Blade disposable, still in test markets.

The newest razor is expected to retail for between 59¢ and 75¢ for two razors. It will compete in the double-blade disposable category with Warner-Lambert's Schick Ultrex, recently introduced, and Gillette's own Good News!. Bic Corp., Gillette's chief competitor in the disposable field, markets a single-blade disposable that sells for about 19¢.

During its introductory period, Swivel's purchasers will be offered a full money-back refund and a 15¢ coupon for the next purchase.

Some observers have suggested that the money-back offer may

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highlights

Monday, April 21, 1980

JWT completes its reorganization by naming William Ross to head international and Denis Lanigan to head administrative. *See Page 4.*

Conference attendees voted overwhelmingly not to fold their City & Regional Magazine Assn. into the larger Magazine Publishers Assn. *See Page 10.*

Families, *Reader's Digest's* sibling, will bow on Sept. 23. *See Page 12.*

"Kramer vs. Kramer" producers spent less than $200,000 on trade advertising and promotions to win the movie its five Oscars. *See Page 12.*

After years of bumbling and fumbling, WNBC has become a significant factor in the New York radio marketplace. *See Page 18.*

Thrift institutions are looking for relief through Federal Reserve moves to curb money funds. *See Page 30.*

The National Advertising Division reviewed 10 challenges to national advertising last month and reversed a ruling it made four years ago. *See Page 34.*

Zoecon Industries, Dallas, plans on snatching some shares of the $179,000,000 flea and tick collar market as a result of its new marketing program. *See Page 39.*

General Foods reorganizes its U.S. domestic grocery business. *See Page 42.*

USA, formerly MSG cable network, plans a more varied, longer program day. *See Page 45.*

Richard C. Douglas introduces the creative director whom Dustin Hoffman used as a model to create his Oscar-winning role of Ted Kramer in "Kramer *vs.* Kramer." *See Page 51.*

Don Kobrin proposes the formation of an Advertising Liaison Assn. to shorten the client/agency communication chain that he describes as overlong and fragile. *See Page 51.*

Dick Wasserman elaborates on the bureaucratic skills creatives should learn to help them move up the agency ranks. *See Page 54.*

Louis J. Haugh explores what he describes as the "last largely uncharted frontier in marketing"—promotion research. *See Page 56.*

Tracy-Locke will rejoin the Four A's soon. *See Page 60.*

In what has been billed as a "battle of the giants," two South African publishers have launched free sheets aimed for the black audience of Soweto, a town of about 1,500,000 near Johannesburg. *See Page 62.*

U.K. advertisers and agencies have no reason to grumble about the expected high cost of Britain's second commercial channel, ITV-2. *See Page 64.*

N W Ayer ABH moved to crystallize its network of affiliates in the Pacific by buying a minority share of MacHarman Advertising, New Zealand. *See Page 66.*

Prince Matchabelli's new men's fragrance is being introduced with a $4,500,000 budget. *See Page 69.*

HR Television, after a brief stint with a conglomerate, seeks new growth opportunities on its own. *See Page 70.*

National food advertising costs $28 per family a year, according to the Agriculture Department. *See Page 79.*

Hawaiian-style potato chips dip into California markets. *See Page 82.*

Scripto is looking to get back in the mainstream with an erasable pen entry. *See Page 87.*

Campbell Soup gives its condensed soup assignment to Backer & Spielvogel. *See Page 86.*

Section 2

Supermarkets, 50 years old this year, are taking on various identities today. Second 2/Grocery Marketing explores what is happening to them and takes a look at the products on their shelves—beginning opposite Page 46.

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Advertising Age/Section 2

APRIL 21, 1980

GROCERY MARKETING

Carting the supermarket into the '80s

BY THEODORE J. GAGE

CHICAGO—Some experts have said the "superstore" will characterize the grocery business during the 1980s. Others say box and warehouse stores are the wave of the future. Still others disagree, saying the standard full-service grocery store will continue to dominate.

As the supermarket industry celebrates its 50th anniversary in 1980, it faces a cornucopia of questions about its future.

"Until recently, there was a widespread feeling that superstores and box stores were the way to go," says Henry Jicha, a grocery specialist with Bache, Halsey, Stuart, Shields, New York. "Today, there's more of a feeling that any number of formats are valid. It's just a matter of deciding the right kind of store to fit a particular location."

Although retailers in this $206 billion industry have one common goal—making a profit—they are taking a number of paths toward achieving that goal.

The options

During the past few years, there has been heavy speculation that superstores would dominate grocery marketing in the coming decade. Generally speaking, the industry defines a superstore as having more than 30,000 sq. ft. of selling area, weekly sales that exceed $120,000 and 30% or more of the selling space devoted to nonfood items, or general merchandise.

Superstores offer a number of advantages to the consumer and store owner. For the customer, a large store with items ranging from imported cheeses to ironing boards offers the possibility of one-stop shopping. That means added convenience and less gasoline consumption. If the store, because of its high volume, can offer bargain prices, so much the better for consumers.

■ For the retailers, superstores can mean increased profits. Statistics show that overhead does not increase proportionally to increases in a store's selling area. Also, superstores sell more general merchandise than conventional grocery stores, and general merchandise has a higher profit margin than food items.

Those factors combine to give superstores a profit advantage. In 1978, they had an average of $6.11 in sales per square foot, compared with the conventional stores' $5.64, according to the Food Marketing Institute, Washington.

In most cases, companies that make a commitment to superstores design and build their facilities—as opposed to buying and redesigning an existing facility—in suburban or low population density areas. They often stand as the major food retailing outlet in a five to 10-mile radius.

Using the superstores' increased volume and variety, retailers hope to get a bigger percentage of the customer's dollar. They also count on the nonfood items to create better profit margins for the entire outlet. But there are other ways retailers can increase profitability.

■ "The quest people have been on is to maximize sales per square foot," says Robert Wunderle, economist and vp-public affairs with Supermarkets General Corp., Wood-

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Theodore J. Gage, a free lance writer from Evanston, Ill., is a frequent contributor to Section 2.

Marketing mix adds a pitch to food editors

BY CAROL GALGINAITIS

CHICAGO—Take one overworked food editor, add a generous helping of culinary conscious readers; set aside. Gather myriad corporate-based recipes and feature stories; separate brand names from copy. Discard former, toss latter with reserved editor and readers; mix well. Release on Wednesday night.

The resulting Thursday food section will be one of the most heavily read parts of the newspaper, a fact not lost on marketers. Many of their execs are well aware of the publicity they will garner from, for instance, a recipe built around fresh citrus or frozen spinach.

■ The companies, therefore, provide editors with a vast array of material ranging from recipes and press releases to background data and free samples.

But how do the editors respond to this barrage of literature? Do their silent vetoes affect subsequent offerings? Are some approaches more popular with editors, and thus more effective from the marketer's advertising point of view?

To the marketer trying to answer these questions, recipe campaigns seem to offer many advantages. They appeal to consumers, they aid the overworked, understaffed food editors, they can be tied to seasonal promotions and they occasionally offer the chance for brand name identification.

"Women today look for convenience but still want to do something on their own," explains Mary Lynn Coyle, public relations manager of The Kitchens of Sara Lee, Deerfield, Ill. "So we develop recipes using our products to which people can add their own finishing touches. For instance, we have a recipe for turning a cheesecake into a fruit flan. We try to look for

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Carol Galginaitis, a free lance writer from Evanston, Ill., is a frequent contributor to Section 2.

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Supermarket of 1980s finds the paths lead everywhere

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bridge, N.J. "There are a couple of ways to do that."

The first, he explains, is to build a large store and attempt to attract a bigger percentage of the shopper's dollars. The second, which is completely opposite to the superstore concept, is to sell only a limited amount of goods and to cut out extras such as meat, produce and frozen food sections. These outlets, called box stores, limited assortment or warehouse stores, usually have far fewer employes than conventional supermarkets, carry a smaller assortment of items and display the items in their cut-away shipping cartons instead of on shelves.

The box store increases its profits by cutting down significantly on overhead, especially wages.

Box stores, moreover, are easy to start and can turn a profit with relatively low sales volume. Whereas conventional grocery stores may need $110,000 sales per week and superstores need more than $150,000 sales per week to make a profit, industry experts say box or no-frills stores can turn a profit with sales as low as $20,000 a week.

A retailer also can open a box store for as little as $50,000, according to industry estimates, while it may take $500,000 or more to open a conventional supermarket and at least $1,000,000 to open a superstore.

"You can take out a short-term lease on a building, spruce it up a little, stock it with boxed items and start selling," says Fredrick W. Kopf, a retail investment analyst with Dean, Witter, Reynolds, New York. "If it works, great. If it doesn't work, you retreat and lick your wounds without taking much of a financial loss."

The choices

Bargain stores and superstores have helped revolutionize the grocery business during the 1970s. Conventional supermarkets, of course, still dominate the industry. But as energy costs and inflation threaten to steal away dollars once reserved for the weekly food budget, retailers are looking at every marketing alternative. Which one should they choose? That depends on corporate philosophy, store location and available capital.

"We are committed to superstores," says Peter Magowan, chief executive officer of Safeway Stores, Oakland, Cal., the nation's largest food chain. "This is the right philosophy in an era of gasoline lines and working wives."

Safeway has made a strong move toward the superstore concept. Although the number of Safeway stores has remained near 2,000 for the past few years, the average square footage per store has increased.

In 1978, Safeway had 26 superstores—by the company's definition, stores with at least 35,000 sq. ft. and a minimum of 1,100 lineal ft. of grocery items and 600 lineal ft. of nonfood items. Today, the company operates 350 superstores, and a Safeway exec says the majority of its 140 stores to be built in 1980 will be superstores.

▪ Another chain following the same line is Supermarkets General. Its 114 Pathmark supermarkets, located on the Eastern Seaboard, are all superstores, as will be 10 new outlets planned for 1980.

Pathmark, like many other chains that have adopted the superstore format, got into it by acquiring a drugstore chain in 1964. Safeway and Lucky Stores, Dublin, Cal., both acquired drugstore chains and consequently offered more nonfood items.

"Food chains were big on acquisitions and diversification in the early and mid-1970s," said one industry executive. "Some came out all right; others failed miserably. Jewel didn't succeed with its Turnstyle stores, and Kroger failed at making the superstore concept work eight years ago because it didn't have enough people who knew how to market general merchandise. Today, Kroger is succeeding with nonfood sales, even though it hasn't acquired anybody, because it has brought in people who know how to market general merchandise."

Grocery chains, agree industry officials, have indeed become much more sophisticated in marketing techniques during the past few years. "You can sell appliances, auto products and so on in a supermarket," says Mr. Kopf of Dean Witter. "But you have to be competitive on price, display it properly, make sure it gets sold properly and provide service if it breaks. You can't just put this stuff on a shelf and expect it to walk off by itself.

Yet, although many of the major chains have at least dabbled in the superstore format, there are some

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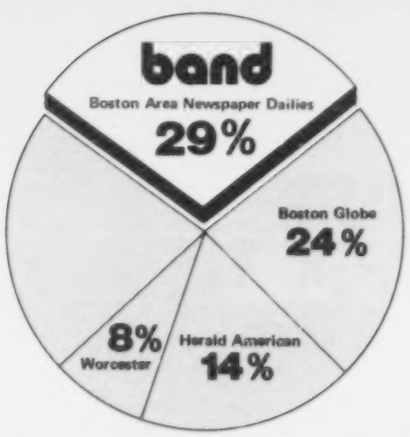
How leaders feel about grocery retailing outlook

	Very optimistic	Somewhat optimistic	Neutral	Pessimistic
Chain execs	32%	37%	21%	11%
Co-op execs	18	70	7	5
Voluntary execs	33	41	16	10
Independent execs	35	42	13	10
Chain store mgrs	36	50	8	6
Independent mgrs	36	42	12	10
Academics	4	46	24	26
Manufacturer execs	21	51	20	8
Total, all groups	27	47	15	11

Source: *Progressive Grocer*, "Grocery Retailing in the '80s"

Get the biggest and best slice of the Boston ADI food market



BAND newspapers reach 566,613 households daily...538,991 are in the ADI

...that's 29% household coverage of the Boston ADI in one buy. BAND makes it easy to reach a large share of your food market. Its circulation follows the normal distribution pattern with 18% in New Hampshire and 82% in Mass. The Boston Globe and Herald American only skim the New Hampshire portion with 3.6% and 5% respectively.

BAND households spend 23%-28% more on food than the average Boston or U.S. household according to a 1978 survey. 92% are coupon clippers but 46% clip from BAND newspapers exclusively. 47% have heads of households under 45 years of age, 51% are college educated and have an average income of $20,845...it's an upscale audience. Write for BAND's newspaper cost analysis of the Boston ADI and BAND's readership survey with all the facts.

Boston Area Newspaper Dailies

band

Nationally Marketed by LANDON ASSOCIATES, INC.

ONE BUY—ONE ORDER—ONE INVOICE
Offering a regular discount of 31% plus NEWSPLAN DISCOUNTS totalling up to 46%.

LANDON ASSOCIATES, INC.
38 Newbury Street
Boston, Mass. 02116

Yes, I want your latest readership survey "BAND READER PROFILE IN THE BOSTON ADI", plus the Boston ADI Newspaper Cost Analysis.

Send _____ copies to:

NAME _____

TITLE _____

COMPANY _____

ADDRESS _____

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1980s supermarket? Trends are unclear

(Continued from Page S-53)

notable exceptions.

The prime example is Winn Dixie stores, Jacksonville, Fla., one of the nation's largest grocery chains. None of Winn Dixie's 1,200 outlets stocks a significant number of nonfood items, other than such standard household items as sponges, work gloves and car wax. The chain's largest store, moreover, is only 30,000 sq. ft.

▪ "We are running the kind of stores we know best," says B.L. Thomas, president of Winn Dixie stores. "We are in the food business, and we have plenty of room to improve that without worrying about anything else."

So, while analysts may have spent the 1970s trying to decide which trend would revolutionize the grocery marketing business, they may spend the 1980s trying to figure out what company will lean toward which format and why.

"Clearly, there is a trend to build larger supermarkets with increased amounts of nonfood merchandise," says Robert J. Schweich, vp-research with Wertheim & Co., New York, brokers. "Moreover, some large entities like Winn Dixie are sticking primarily to the store format, emphasizing traditional supermarket items, including more limited amounts of nonfood items."

Or, in other words, Mr. Schweich says, "there are no clearcut trends anymore." The percentage of superstores and limited assortment outlets may increase in proportion to the total number of supermarkets, but they may never grab 40% of the grocery market, as some industry officials predict.

An increasingly popular move—especially with new construction costs skyrocketing and financing either unavailable or at 20% interest rates—is to refurbish existing stores.

"Dumping existing stores in favor of building new superstores used to be an easy move," says an executive with a major grocery chain. "But when we need to borrow a million bucks and 23% interest stares us in the face, we think two or three times about building."

Such talk of the economy brings to mind the box store alternative, and suggests that a worsening economy might give that a push.

▪ "The superstore has a greater ability to satisfy the customer's everyday needs," says Willard Bishop, president of Willard Bishop Consulting Economists, Barrington, Ill.

But he says there has been "no great clamor for one-stop shopping, even with the gas crisis."

Because superstores need a large site, they are usually located away from populated areas. "Would a consumer rather drive 16 miles to one big store or make four trips of four miles and get the chance to shop for the best price at a variety of stores?" he asks.

The box store is attractive, he explains, because it can be located in heavily populated areas and offer lower prices to cost-conscious shoppers who don't mind going elsewhere to buy produce, meat and dairy products. He doesn't agree with the widely held opinion that box stores can succeed only in suburban areas with shoppers who can lay out $200 each trip to realize a $15 or $20 savings.

"Contrary to what some analysts say, box stores tried in the city have been very successful," he says. "Consumers don't have to buy big volume to know they're saving money."

Many chains have adopted this no-frills concept. Great Atlantic & Pacific Tea Co., Montvale, N.J., opened its first limited assortment store—Plus Discount Foods—in August, and plans to have 100 open by the end of 1980. They are moderate in size, averaging 9,000 sq. ft. of sales space.

Jewel Cos. discount-style outlets, called Jewel T, carry a limited assortment of items at low prices. Jewel, Melrose Park, Ill., is also experimenting with no-frills stores different from the Jewel T stores. Five of them now being tested in the Chicago area have no frozen foods or fresh meat and require customers to bag groceries, but they do have produce and dairy sections.

The outlook

The 1980s will call for some astute planning by supermarket chain execs. "There will be no easy way to increase profitability," says analyst Mr. Kopf. "A company will have to examine every store and every location to find just the right formula."

In some locations, he explains, a conventional supermarket, backed up by aggressive advertis-

Census of retail grocery industry

Population (millions)	219.5
Households (millions)	78.9
Average household size	2.78
1979 food store sales	$206 billion
Supermarkets	
Total	33,500
Chain*	55%
Independent	45%
Per 100,000 population	15.3
Per 100,000 households	42.4
Supermarket sales	
Total	$155 billion
Chain	60%
Independent	40%
Per capita	$706
Per household	$1,965
Supermarket checkouts	
Total	235,000
Average per store	7.0
Average weekly sales per checkout	$12,680
Checkouts per 100,000 population	107.1
Supermarket size (Sq. ft.)	
Total	580,000,000
Average per store	17,313
Average weekly sales per sq. ft.	$5.13
Sq. ft. per checkout	2,468
Sq. ft. per employe	414
Sq. ft. per capita	2.64
Supermarket employes**	
Total	1,400,000
Average per store	41.8
Average weekly sales per employe	$2,129
Employes per checkout	6.0
Employes per 100,000 population	637

Source: Progressive Grocer, "Grocery Retailing in the '80s."

Note: Figures for the total U.S. are Progressive Grocer Data Center and Research Department projections and estimates.
* Chains are defined as those operating 11 or more stores.
** Employes are fulltime employes, with two parttime employes counted as one fulltime employe.

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Source: SM&M '79 Survey of Buying Power. Represented by Branham Newspaper Sales

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Top 15 grocery markets

	Population	Households	Food store sales (billions)	Number of stores	Per cent chains/ per cent independent
New York	15,712,371	5,899,486	$15.4	1,693	66.9/33.1
Los Angeles	10,502,311	4,058,810	10.5	1,305	78.3/21.7
Philadelphia	7,774,896	2,788,855	7.6	779	58.0/42.0
Chicago	7,741,914	2,757,486	7.1	824	54.0/46.0
Baltimore-Washington	6,829,081	2,414,612	6.5	824	73.8/26.2
Boston	6,768,058	2,422,072	6.7	827	56.3/43.7
Detroit	6,176,900	2,127,809	5.6	669	59.8/40.2
San Francisco-Oakland	5,114,704	1,970,422	5.3	703	62.6/37.4
Cleveland	4,545,224	1,605,451	4.3	561	49.2/50.8
Pittsburgh	4,341,870	1,572,343	3.8	568	38.9/61.1
Dallas-Fort Worth	3,267,037	1,214,425	3.2	538	71.7/28.3
Houston	3,151,652	1,113,600	3.2	508	61.2/38.8
Miami-Fort Lauderdale	3,078,000	1,226,013	3.5	404	81.7/18.3
St. Louis	3,048,258	1,095,615	2.7	445	44.3/55.7
Minneapolis-St. Paul	3,021,326	1,041,419	2.5	419	46.1/53.9

Source: Progressive Grocer, "Grocery Retailing in the '80s"

ing, spruced up with redecorating and bolstered by outstanding service, may be the answer. In other locations, consumers may respond most favorably to stores that promote a cut-rate image and offer cut-rate prices.

"There's little doubt that competition for the consumer's attention and dollars will get more and more fierce—particularly if inflation continues at its present rate," says Alex Wilson, general manager of Dansico Associates, a marketing/promotion company with a number of food industry clients. "Superstores and limited assortment stores have their ways to get a competitive edge—the very nature of their formats appeals to certain market segments. We're trying to give conventional supermarket chains a competitive edge through effective marketing."

In analyzing the current state of grocery marketing, Mr. Schweich of Wertheim & Co. agrees that strong merchandising efforts by conventional supermarkets could keep them from losing out to the alternative stores.

"There is some evidence that the large, well managed supermarket chains have developed effective competitive merchandising measures," he says. "This might preclude the rapid, sustained expansion of these [alternative] formats."

Some of the merchandising techniques include games, copper cookware, intrastore stamp redemption that rewards consumers for their loyalty by giving them discounted food items when they present a certain number of stamps and aggressive advertising that emphasizes a store's service and selection.

Point of purchase advertising may also play a key role in keeping conventional supermarkets healthy. Attractive floor and shelf point of purchase displays that are easy to assemble should become increasingly popular among store managers, says Howard Stumpf, president of the Point Of Purchase Advertising Institute (POPAI), New York. "Self-contained sales units let store managers cut down on the amount of time and manpower they might otherwise need to arrange shelf displays and so on," he explains.

■ Although POPAI has a vested interest in promoting point of purchase items, industry observers agree that p.o.p. will play a major role.

"Box stores and the like may be great," said one company executive, "but people are still going to have to go to a regular store for milk, meat, frozen foods and produce. There's still a very big place for conventional stores, and how well they do depends on how well they advertise and what they do with the customer once she's in the store."

As one analyst puts it: "Inflation and zooming energy prices have cast a cloud over the entire industry. Anyone who claims to know the future of the grocery business is lying."

But one or two conclusions are obvious. The supermarket industry will become increasingly segmented, with a variety of format stores to appeal to various consumer needs and wants. And strong merchandising efforts will be crucial to the success of any supermarket or chain, no matter what formats they use. #

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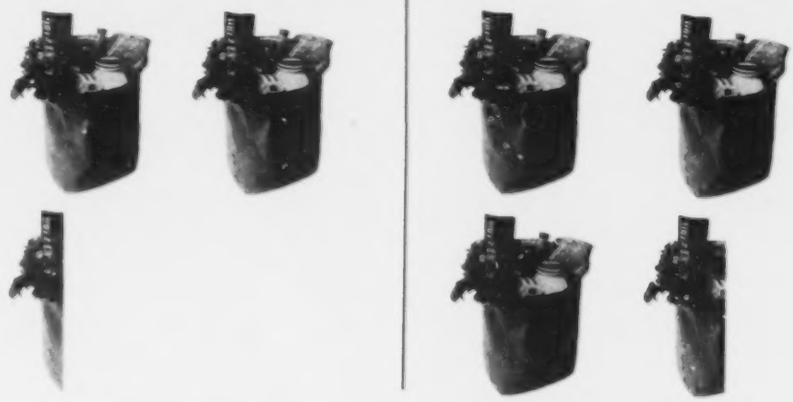

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Bread supplies meals — and the messages

BY HENRY R. BERNSTEIN

DALLAS—The average consumer may not attempt to eat the morning newspaper for breakfast or last week's news magazine for dinner, but there is a medium that's made to be eaten, is tasty and right with any meal. It's bread.

The bakers across the country—not unlike publishers, broadcasters and other members of "the media"—are always working to improve their product to attract both consumers and advertisers.

While a publisher may worry about pictures being off register and a broadcaster may worry about the quality of a signal, the baker has the problem coupons, which are printed in dull, bland colors (approved by the Food & Drug Administration) and may get crumpled and be partially hidden in the bread bag.

Henry R. Bernstein is an ADVERTISING AGE senior editor based in Dallas.

▪ A new Dallas company, Target Group, hopes to solve bread's media problems with Vu-Pak, a packaging method developed by its parent company, Glopak Industries of Montreal, Canada.

Target Group's Lee Pearlman, who, along with A. Leonard Goffman, has been traveling the country preaching the virtues of his company's product to both bakers and advertisers, admits unabashedly that he considers Vu-Pak "to be the Cadillac of couponing."

Vu-Pak offers a "new method of fixing a coupon in permanent position inside a bread bag," he explained. The coupon can be removed without destroying the bag, which is good for the baker and the consumer, and it can be seen from outside the bag. "That means lots of impressions for the couponer," he said.

Bakeries now use equipment to blow a coupon into a bag. "The problem with that method is that it's not 100% accurate. Some bags will end up without coupons—and the method slows down the automated packaging process. We will be far more accurate, and the bakeries will get the bags with the coupons already inside," he said.

▪ Target Group is aiming for a summer launch of its program, offering a weekly drop of 6,500,000 digest-size coupon pages through participating bakeries. The program offers only 104 positions a year—one coupon on each side of the digest size page—per market. "We are the antithesis of coupon clutter," Mr. Pearlman said. A major objective of using the page, which is folded, is to get the impact of a full page ad with the coupon.

Because the coupon page is enclosed within its own pouch inside the bread bag, the page does not come in contact with the bread. For the advertiser, this Vu-Pack feature means bright inks can be used in the ad printing to achieve magazine quality. By contrast, standard blow-in coupons, because they come in contact with the bread, must be printed with the duller FDA-approved inks.

Almost everyone seems to know someone who is dieting these days, and dieters often talk about cutting back on bread. In an atmosphere like that, why would an advertiser want to put his money in a bread bag? To Mr. Pearlman the answer is simple.

Although bread news hasn't been all good in recent years, there seems to be no reason to call bread a dead medium. "Bread targets your market and it is the third most frequently purchased item in the supermarket," he said. "Bread is purchased and consumed fresh. The person buying today is likely to be back within a week buying another loaf.

"We reach the markets because bread goes into practically every home in the country, including rural areas not served by Sunday newspapers."

▪ It's no secret to anyone who has visited a supermarket bread section in recent years that the medium has been converting from a traditional plain white to color. It reflects the fact that per capita consumption of white bread has been declining for several years and that to some extent the decline has been offset by increasing consumption of variety breads, buns and muffins.

The total retail value of bakery goods is estimated by *Bakery Pro-*

The hot dog market

(Continued from Page S-43)

A more underlying problem is cited by Pat Ciez, vp-marketing and sales, Peter Eckrich & Sons, Fort Wayne, Ind. Mr. Ciez points out that many homemakers worry about just how nutritionally adequate hot dogs are and about the kind of preservatives and meat that go into them. This concern, which sparked much controversy in 1972 after the appearance of critical articles in "Consumer Reports" and *Life*, appears to be increasing again.

▪ "When you talk about hot dogs to the consumer, his impression is not where we like it to be," said Mr. Ciez. "He does not see them as being that nutritious a product for the family. But when you get into specific brands, that kind of changes things around. Consumers do trust certain brands of hot dogs as having better ingredients than others."

He said the company has attempted to bolster a good image by appearing on a number of tv shows trying to present a story for the processed meat industry, not just Peter Eckrich.

"We've just been working on extensive media tours in which we covered a number of markets," he added. "We've conducted surveys in given markets to determine what kind of information and perception consumers had of products *vs.* what the facts were.

"Beyond that, we've gone to nutritional labeling on all of our hot dog packages. We've also gone to considerable length in our tv advertising to communicate quality about our hot dog. We are very concerned about communicating, 'Hey, these hot dogs are good. They're good tasting and they don't have bad stuff in them.' "

▪ Eckrich puts out all meat and beef franks in 12 and 16-oz. packages. They are marketed in the Midwest, Southeast and Southwest and eventually will be distributed nationally. More than 90% of Eckrich's advertising budget is in tv, with the rest in radio and print.

"It's anywhere from 3% in a new market to 35% in some markets where we've been doing business for some time," said Mr. Ciez. "In many Indiana markets we're up in the 30s."

One of the company's main concerns is its competitors' increasing use of poultry in hot dogs.

"They have not affected us, at

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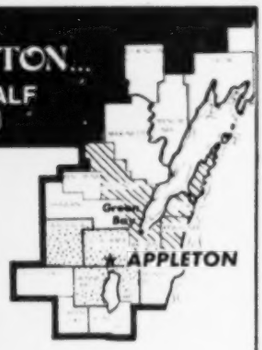

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1978 Population	332,400	34%	250,000	26%
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duction & Marketing at $17 billion. Of that total, an estimated 8% is sales at the growing number of instore supermarket bakeries, which bake on premises. The publication estimates that the instore bakery percentage of the total retail volume of bakery goods will probably double in the next five years.

At the instore bakeries, an estimated 35% of the sales are for bread and rolls, 35% represent cake sales, 15% doughnuts and 15% sweet goods, including cookies and pie.

In sheer tonnage, America is continuing to eat plenty of bakery products. Using figures from the Census of Manufacturers of the Department of Commerce, *Bakery Production & Marketing* projects that total bakery foods will reach 24.7 billion lbs. in 1982, up from 23.5 billion lbs. in 1977 and 22.8 billion lbs. in 1972. The publication projects that total bread and rolls will hit 15.4 billion lbs. in 1982, up from 14.9 billion lbs. in 1977 and 14.8 billion lbs. in 1972.

▪ As a part of the total bread and roll tonnage, white bread—continuing its trend—is projected by the publication to hit 5.7 billion lbs. in 1982, down from 6.7 billion lbs. in 1977 and 8.6 billion lbs. in 1972. At the same time, variety breads (not including hearth bread) are projected to hit 2.6 billion lbs. in 1982, up from 2.0 bilion lbs. in 1977 and 1.5 billion lbs. in 1972.

The "hot 'n' ham" market, otherwise known as hot dog and hamburger bun business, is projected to hit 3 billion lbs. in 1982, up from 2.6 billion lbs. in 1977 and 2.3 billion lbs. in 1972. (There are said to be 20 plants across the U.S. that make a single product—buns for McDonald's hamburgers.)

The hard crust hearth breads and rolls which include Italian and French bread, is projected to hit 2.6 billion lbs. in 1982, up from 2 billion lbs. in 1977 and 1.1 billion lbs. in 1972.

A subcategory of this group, brown and serve rolls, has apparently been losing ground in the marketplace to variety bread and is projected by the publication to hit 185,000,000 lbs. in 1982, down from 264,000,000 lbs. in 1977 and 376,000,000 lbs. in 1972.

▪ Meanwhile, in the highly competitive and very regional bread business, according to U.S. government figures, there were 3,062 wholesale baking plants in the U.S. in 1977, most of them small. *Milling & Baking News*, in its Baking Directory, lists only 781 plants with more than $1,000,000 in annual sales.

In an effort to keep up with apparently changing consumer inter-

(Continued on Page S-46)

Championship race driver Cale Yarborough appears in commercials for Campbell-Taggart bread.

this point," Mr. Ciez said. "They represent 6% to 10% of the business. They're sold primarily because of the price. That's a good price point for shoppers interested in buying less expensive hot dogs."

From a food service point of view, meanwhile, the market is in "real good shape," says Larry Dessyn, products manager at Dubuque Packing Co., Dubuque, Ia.

▪ The cost of hot dogs, compared with other types of sandwiches, and the ease of their preparation are advantages for this segment of the industry.

"These are the things we try to utilize every day as sales tools when we're trying to get people to put hot dogs on their menu," said Mr. Dessyn. "They're a terrific standby for any kind of restaurant or fast-food operation."

Dubuque markets meat and beef hot dogs but has done some tests with chicken.

Dubuque is also trying a new strategy through its "Super Mex Dog." "Mexican food," Mr. Dessyn said, "gives us another beautiful outlet for sales of hot dogs. I've had some positive comments from a couple of research departments, and I think someone will, if they go on with this, try to use a smaller hot dog to keep the total cost down. It shows a lot of potential to me."

Mr. Dessyn's version of the Super Mex is a quarter pound hot dog inserted in a folded burrito shell. It is topped with taco meat, lettuce, tomatoes, cheese and hot sauce.

▪ For its part, Armour & Co., Phoenix, is—for the first time in its history—taking a new road in its marketing attack: It is sponsoring network tv specials. The first came last month with the Bob Hope special.

"In the past we have done network tv advertising," said Kathy Meell, director of media relations. "But for these specials we have a 90-second corporate commercial about our entire food product line.

"We also do point of purchase, newspaper couponing, spot tv and radio for our hot dogs."

One point of purchase promotion in January was a knitted cap and scarf for $4.95 and two proofs of purchase of any size Armour Star hot dogs. "Usually there is something else around the Fourth of July but it is still undecided as to what it will be," said Ms. Meell.

Americans and hot dogs have had a love affair for years and this apparently won't abate much, if at all. Good products brought in at both the premium and regular price ends will keep this alive. The major concern is the higher prices the consumer must pay, but comparing this to other meat products, hot dogs are a bargain. And they are still doggone good eating. #

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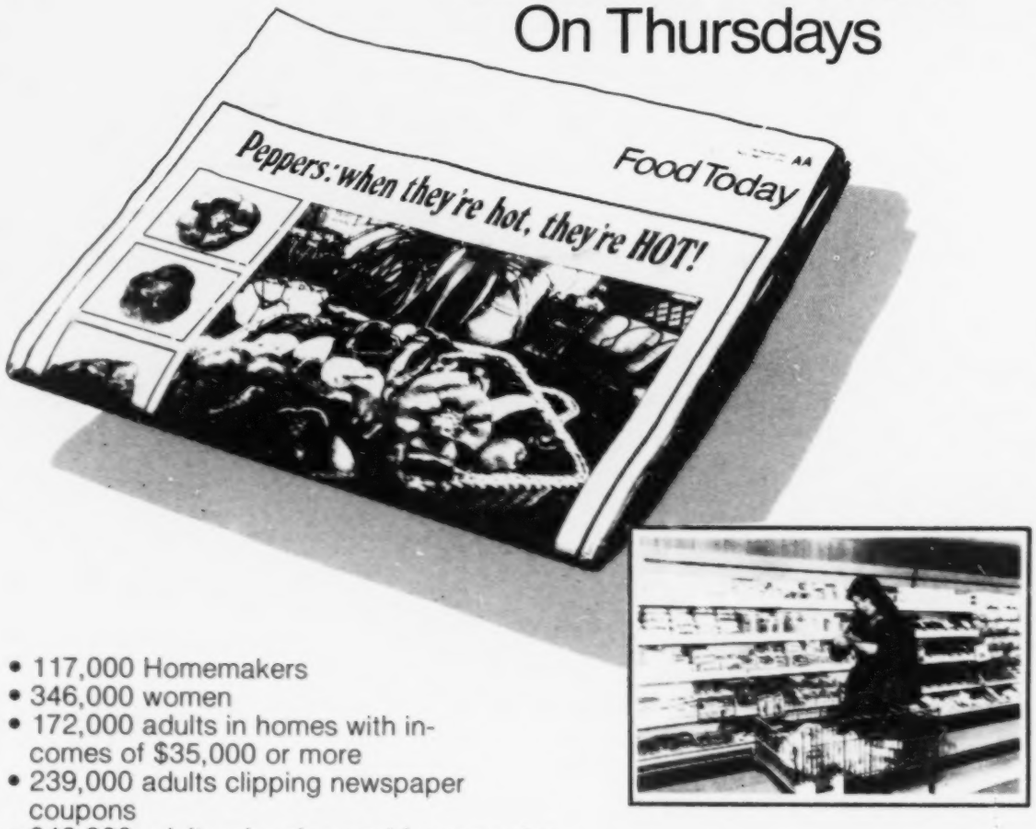

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source: 1979 Houston Market Study by RICI
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Bread, baked products still American favorites

(Continued from Page S-45)

ests, bakeries have been willing to try new ideas for expanding the market. Because of the growth of variety breads during the 1970s, *Bakery Production & Marketing*, in a 1978 survey, zeroed in on that segment of the business and found that more than three-quarters of the bakeries produced one or more types of variety breads and had plans to introduce more.

Whole wheat is the most popular variety nationally, with raisin bread running second in most parts of the country. Preferences differ by region, however. For example, in the 1978 survey, cracked wheat was baked by almost 68% of the bakeries in the western states, ranking third in popularity. But cracked wheat didn't make the top six among bakeries in the Northeast and South. Franchise variety breads were found to be produced by 45% of the bakeries, with Roman Meal the most widely franchised, followed by Hollywood.

In the early 1970s, as Americans went on a health kick that called for more fiber in the diet, bakeries responded with high fiber variety breads. For a few years, fiber breads looked as if they would be the greatest development in the business since sliced bread and by 1978 they were the sixth most popular variety bread.

> "People buy (bread) for taste, not health. That's why fiber bread hasn't taken off."

■ What some saw as the promise for fiber bread, however, did not develop, and 1978 proved to be something of a peak year. Commented one industry observer: "It's never been more than just another variety bread." Commented another: "People buy for taste, not health. That's why fiber bread hasn't taken off."

It isn't known whether a well publicized squabble between the federal government and ITT Continental Baking Co., Rye, N.Y., over Fresh Horizons, the leading fiber product, might have dampened consumer interest in the category. After its introduction in 1976, Fresh Horizons, with strong ad support, rose to the top in the category and has remained there despite the fights with the government.

In March, 1979, ITT Continental agreed to Federal Trade Commission demands that Fresh Horizons ads disclose that its highly promoted fiber content comes from wood or the pulp of trees. Before the agreement with the FTC, the Food & Drug Administration required the addition of the term "special formula" to the labeling because Fresh Horizons did not meet the standard definition of a bread product.

Elsewhere, as part of the push to keep up with consumers in the 1970s, bakers added yogurt bread to supermarket shelves. Then last year, Mrs. Baird's Bakeries, Fort Worth, Tex., began testing the first use of processed cottonseed kernels in a bread, ProTeina. The product continues to be available in supermarkets served by Mrs. Baird's, but ad support has been suspended. The product is believed to have suffered from both a lack of strong, sustained ad support and pricing problems.

■ When ProTeina, a franchised bread from Feuer Food Products, Northfield, Ill., was launched with newspaper, radio and point-of-sale advertising, the strength of Mrs. Baird's in Texas, and the ability of company president and on-camera spokesman R. Vernon Baird to move its products, suggested that consumers would snap up ProTeina if Mr. Baird would feature it in one of his tv spots. But Mr. Baird didn't make the spot. ProTeina was launched as a premium price bread, but the price rapidly escalated, breaking the $1 barrier.

While bakers have been trying new products, an old product—English muffins—is enjoying the growing interest in variety breads. At S.B. Thomas, subsidiary of CPC International, the major product is English muffins, delivered fresh daily. Dick Zuver, director of marketing, wouldn't disclose research figures, but admits the market has been "growing quite rapidly over the past decade."

■ As the market grows, so do the ways people serve muffins. The Thomas company, Totowa, N.J., has at times advertised various serving suggestions, but the product remains primarily a breakfast item. Current Thomas advertising—on television—suggests "Thomas tastes better than toast."

English muffin preferences—like preferences for other bread products—vary by region. But the basic regular flavor continues to hold a lion's share of the business. #

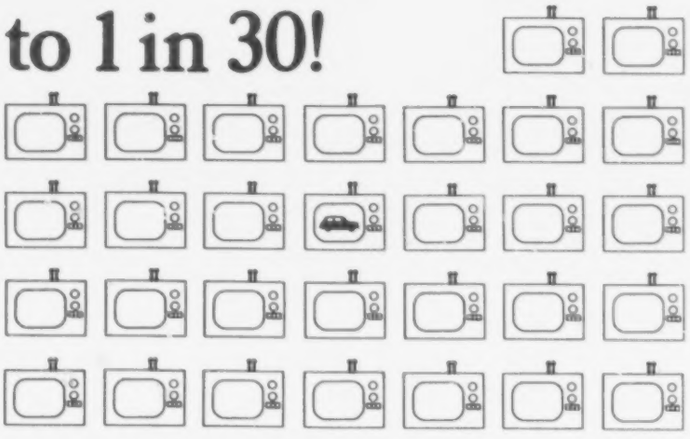
Top bread bakers

Marketer	Baked food dollar volume (in millions)
ITT Continental	$1,300
Campbell Taggart	1,000
Quality Bakers of America*(Sunbeam)	970
W. E. Long & Co.* (Holsum)	850
Interstate Brands	536
American Bakeries Co.	485
Beatrice Foods	300
Flowers Industries	230
American Bakers Cooperative*	200
Safeway Stores	175**
Arnold-Orowheat	120**
Pepperidge Farm	127**
Metz Baking Co.	120
S. B. Thomas	110**
Stroehmann Brothers	100
Kroger Co.	75**

*A cooperative organization.
**AA estimate.
Source: *Milling & Baking News: 1980 Baking Directory.*

The chance of having your product seen by Tulsa TV viewers has dropped from 1 in 3

to 1 in 30!



When cable TV came to Tulsa, it was good news for the viewer, but bad news for TV advertisers. Suddenly, the chance to expose your advertising message to a viewer was divided among thirty stations.

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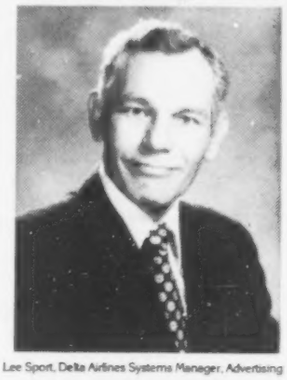

Lee Sport, Delta Airlines Systems Manager, Advertising

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Atlanta up 14.7% in spot tv $

By MAURINE CHRISTOPHER

NEW YORK—Atlanta evidenced the greatest strength in spot tv prices in the April SQAD analysis of prime time buying on affiliates in the top 20 markets. Nine other markets also registered double-digit gains over 1979 levels.

In Atlanta, buys on affiliates were averaging an $86 cost per household rating point—a hike of 14.7% over April 1, 1979. Next in line in terms of increases were: Tampa, 13.2%; Miami, 13.1%, and Baltimore, 12.5%.

This monthly budget and buying guide covers the country's 51 largest markets. It is based on schedules placed by 14 major ad agencies through March 28.

Subscribers also get a budget planner offering projected cpps for 200 markets for the next six quarters. The estimates are broken down for various time periods.

Marvin Richfield, president of Spot Quotations & Data, noted that prime prices in the largest cities continued to show seasonal increases but not on the same "dramatic scale" as in the last mid-March report.

In the No. 1 market, New York, he saw the transit strike affecting retail advertising slightly. However, he pointed out that most major stores have suburban branches within the viewing area, and retailers reportedly plan to advertise heavily to get customers back in once the buses and subways are running again.

Late news in this city—and lots of people certainly weren't getting home in time for the early news—continued to climb. Estimates there ranged from $240 for April to $243 for May.

And ABC's new late night newscast continued to boost the rates for spot fringe periods following the show, Mr. Richfield said. The newscast itself carries some spot availabilities for local sale.

▪ Random late news cpps for other cities in April and May include: Los Angeles—$162, April, and $163, May; Chicago—$141 and $145; Boston—$130 and $131; Philadelphia—$121 and $123; San Francisco—$120 and $121; Dallas—$91 and $93; Houston—$82 and $83; Baltimore—$64 and $65, and San Diego—$47 and $48.

Next to New York, late fringe was commanding the highest fees in April in Los Angeles at $120; Boston, $108; Philadelphia, $107; San Francisco, $96; Chicago, $85, and Detroit, $68.

Mr. Richfield characterized the second quarter as "looking normally strong." Some second quarter prime time estimated cpps in markets below the top 20 are: Denver, $76; Hartford, $69; Sacramento, $60; Phoenix, $59; Portland, Ore., $53; Buffalo, $48, and Cincinnati, $46. Affiliates are included in all these estimates; independent stations are excluded from day and prime time breakouts. #

April 'street' prices for spot tv on net affiliates

Nielsen market rank	Average cost per household rating point for 30-second spot: Prime time '80 vs. '79
1. New York	$348 (+ 7.7%)
2. Los Angeles	276 (+ 7.4%)
3. Chicago	203 (+ 9.1%)
4. Philadelphia	149 (+ 8%)
5. San Francisco	166 (+ 5.7%)
6. Boston	158 (+10.5%)
7. Detroit	123 (+11.8%)
8. Cleveland	77 (+11.6%)
9. Washington	100 (+ 4.2%)
10. Dallas	118 (+11.3%)
11. Pittsburgh	81 (+ 9.5%)
12. Houston	110 (+ 8.9%)
13. Minneapolis	79 (+11.1%)
14. St. Louis	57 (+ 7.5%)
15. Miami	95 (+13.1%)
16. Atlanta	86 (+14.7%)
17. Seattle	80 (+ 8.1%)
18. Tampa	77 (+13.2%)
19. Baltimore	81 (+12.5%)
20. Indianapolis	61 (+10.9%)

Ranked by market size	Market combinations at a glance: Prime time cpp	cpm
1-10	$1,718	$6.87
11-20	807	8.47
21-30	523	7.73
31-40	341	6.32
41-50	268	5.85

Source: Spot Quotations & Data, 950 Third Ave., New York 10022. Average cpps for a 30-second spot were determined from ad agency conventional buys on affiliates as of March 28. Excluded are spots bought on a 52-week basis or calling for 150-plus gross rating points weekly. These averages are a yardstick and not a listing of the market's lowest price. Ratings used are an Arbitron/Nielsen average. These guides can be applied to 60s—200%—and 10s—50%. Percentage gain over April, 1979, is shown in parentheses.

When the offer is refused

"Everytime I made someone an offer, they refused," says this diner, echoing a theme from "The Godfather." But with Tussy Red deodorant, "when I make people an offer they can't refuse . . . they can't refuse." The Lehn & Fink campaign (AA, March 3) is via Warren, Muller, Dolobowsky.

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Advertising pages in April consumer publications

Current and April '79 figures for U.S., Canadian and foreign publications reporting to Advertising Age

	Pages			
	April 1980	April 1979	Jan.-April 1980	Jan.-April 1979
Women's				
††§Bride's Magazine	—	—	598.9	494.2
§Cosmopolitan	259.0	235.3	751.7	693.9
Essence	84.0	84.0	274.0	256.0
§Family Circle	182.0	201.2	530.5	580.8
▲Family Health	26.1	26.7	102.1	99.4
§Good Housekeeping	178.8	180.5	610.5	587.9
Ladies' Home Journal	117.1	107.1	399.7	405.7
Lady's Circle	8.1	7.3	36.0	39.5
McCall's	111.7	108.4	384.4	402.4
○McCall's Working Mother	—	—	116.3	—
†Modern Bride	—	—	499.7	506.9
Ms.	59.7	54.8	188.2	161.5
○New Woman	—	—	62.8	78.2
§Parents Magazine	58.5	46.7	227.2	191.8
Playgirl	46.0	34.6	191.2	142.8
Redbook	107.1	121.9	425.1	465.3
Self	68.3	43.5	196.8	146.8
Seventeen	127.1	119.7	389.4	386.5
Soap Opera Digest	10.4	8.8	51.2	29.8
*Talk	13.0	14.3	64.1	59.7
'Teen Magazine	53.9	43.5	162.9	154.2
§True Story	52.1	54.0	206.6	207.6
§Woman's Day	216.5	202.2	546.2	522.3
The Workbasket	25.7	23.6	124.8	107.0
Working Woman	51.2	31.7	161.9	106.3
Total Group	1,836.3	1,749.8	7,302.2	6,806.7
General				
▲A.D. Publications	18.0	11.0	55.8	48.2
After Dark	32.5	30.6	125.5	120.6
Air Progress	21.7	26.0	89.6	90.2
American Forests	13.8	14.7	64.4	61.1
§American Legion	24.8	30.0	117.3	128.1
○Americana	—	—	55.1	71.4
Apartment Life	57.7	52.2	181.5	202.6
§▲Architectural Digest	139.5	107.4	406.9	333.2
§The Atlantic	56.0	34.9	133.5	134.2
○Audubon Magazine	—	—	64.9	69.2
Blueboy	25.1	22.6	110.8	97.5
§Bon Appetit	82.1	67.9	267.4	210.1
Book Digest	42.4	52.0	133.5	189.8
Christian Herald	42.8	43.3	159.8	177.1
Christian Life	27.1	33.3	108.6	123.1
'Christianity Today	49.0	49.8	241.7	234.0
Complete Men's Group	25.0	24.3	99.3	97.3
Country Journal	47.4	39.2	192.3	176.8
Creative Computing	85.1	48.7	326.7	201.1
▲Cuisine Magazine	49.6	35.6	137.1	100.7
Ebony	94.1	93.9	335.2	334.7
Elks Magazine	22.5	25.7	100.4	112.2
§Esquire	53.7	39.5	161.0	114.0
50 Plus	38.8	25.2	108.7	66.1
Flying	61.2	54.9	222.5	195.0
§Gentlemen's Quarterly	107.8	88.2	319.7	257.3
Golf Digest	91.8	116.3	306.1	343.4
§Golf Magazine	62.7	76.5	362.5	321.9
Gourmet	69.8	71.9	230.9	221.7
§Harper's Magazine	49.7	29.0	136.0	132.3
○Hi-Fi/Stereo Buyer's Guide	18.8	26.2	45.2	48.7
*High Fidelity	63.2	68.2	240.6	272.6
Income Opportunities	42.4	43.7	184.2	186.1
Kiwanis Magazine	16.2	19.3	61.5	63.8
Let's Live	91.5	91.4	386.5	357.3
Life	66.3	43.4	229.8	175.1
Lion Magazine	5.0	18.0	20.0	76.2
Modern Photography	134.1	135.8	381.7	372.4
§Money	85.8	81.5	286.7	262.4
Moneysworth	18.2	20.3	80.6	91.1
Moody Monthly	52.5	50.0	209.2	230.0
○Moose Magazine	22.0	22.0	84.0	84.0
○Mother Earth News	69.2	42.2	121.0	87.2
○Museum	—	—	24.6	—
National Geographic	36.0	37.5	124.8	123.3
National Jewish Monthly	28.9	33.8	114.8	114.9
▲Natural History	65.3	43.8	192.2	179.7
Omni	51.4	30.4	192.2	104.1
§Oui Magazine	24.1	17.6	89.1	63.0
§Penthouse Magazine	82.2	70.2	282.9	256.7
Petersen's Photographic	49.5	46.2	171.2	202.8
Playbill	46.1	40.1	173.8	170.8
§Playboy	124.6	118.9	424.6	421.4
Popular Photography	148.9	164.5	562.5	628.8
Prevention	91.6	111.1	348.7	444.6
Prime Time	17.5	—	69.2	—
Psychology Today	65.3	63.4	216.5	206.3
▲Quest '80	29.0	32.3	103.0	77.0
§Reader's Digest	104.9	134.6	367.1	433.2
Rotarian	17.1	21.1	116.4	86.8
††Saturday Evening Post	51.5	52.3	151.9	146.5
Scientific American	86.1	91.9	339.3	283.7
Signature	48.8	46.9	178.5	162.8
C. Smithsonian	84.0	71.5	314.6	267.8
Stereo Review	73.3	79.2	299.1	302.4
A. Success Unlimited	20.3	44.5	92.5	156.7
Tennis Magazine	74.4	72.6	217.1	231.8
Town & Country	111.6	86.7	342.6	285.8
Travel/Holiday	77.2	65.6	223.3	205.3
Travel & Leisure	109.7	95.5	360.9	323.9
VFW Magazine	29.5	23.7	129.2	118.2
Weight Watchers	19.8	19.9	76.4	79.3
World Tennis	56.6	55.8	194.4	158.1
Writer's Digest	19.4	23.7	76.3	76.4
Yankee Magazine	87.0	92.5	365.8	399.5
Total Group	4,103.5	3,894.4	14,621.2	13,983.4
Fashion & service				
Glamour	199.1	201.5	589.3	593.8
Harper's Bazaar	103.5	93.1	310.0	266.1
Mademoiselle	166.5	146.4	453.8	441.6
††L'Officiel/USA	—	—	100.3	108.5
E. Vogue	196.0	197.7	713.1	653.6
▶"W"	62.0	63.0	242.9	218.6
Total Group	727.1	701.7	2,409.4	2,282.2
Arts & antiques				
American Artist	46.3	72.7	202.5	228.3
Antiques	157.1	132.3	614.5	526.5
Antiques World	59.5	68.7	204.5	224.3
○Art & Antiques	—	—	117.1	88.9
▲Artnews	116.0	88.0	436.3	390.0
Total Group	378.9	361.7	1,574.9	1,458.0
Home				
§Better Homes & Gardens	134.3	137.3	497.6	519.0
○Colonial Homes	—	—	114.0	72.6
▲Decorating Showcase	21.0	—	94.8	40.6
▲Family Handyman	60.2	52.0	246.6	226.9
Flower & Garden	36.0	38.6	136.4	143.2
The Hometown Magazines:				
Dallas-Fort Worth Home/Garden	54.4	43.3	190.5	125.2
Houston Home/Garden	121.9	108.3	407.4	404.0
Horticulture	32.1	39.4	127.8	153.5
House Beautiful	119.0	118.3	389.7	354.8
House & Garden	139.5	142.5	435.7	428.7
†Homeowners How-To	—	—	55.3	40.9
Hudson Home Magazine	48.9	50.2	184.7	187.3
Indianapolis at Home	54.5	67.4	216.0	260.5
Living:				
○Dallas	—	—	228.9	235.8
○Houston	—	—	192.7	227.5
○Denver	—	—	167.6	163.3
‡Austin	—	—	46.1	47.3
‡San Antonio	—	—	46.3	37.0
○Phoenix	37.5	26.8	80.0	53.6
○Tampa	31.1	—	64.9	—
▲1001 Decorating Ideas	31.2	—	98.0	77.5
Organic Gardening	82.0	76.1	385.6	364.6
○Plants Alive	29.7	24.4	54.4	74.1
San Diego Home/Garden	60.9	—	195.7	—
D. Southern Living	166.2	158.6	484.9	536.2
§Sunset Magazine	169.4	163.8	493.4	530.5
▲Texas Homes	59.0	57.9	400.3	507.3
○Workbench	—	—	130.7	127.6
Total Group	1,486.8	1,304.9	6,168.0	5,939.5
In-flight				
#Aboard Group	—	—	384.0	348.0
Air California	60.0	63.8	223.0	232.2
Aloft/National Airlines	55.9	84.9	221.9	142.2
American Way	68.9	59.3	257.0	211.8
Braniff's Flying Colors	30.2	37.7	137.0	118.3
Clipper	32.5	—	139.3	—
Delta Sky	46.2	48.3	177.0	189.2
East/West Network:				
○Air New England Flying Your Way	—	—	34.2	—
Eastern Review	89.6	90.9	321.5	345.9
Hughes Airwest Sundancer	82.8	77.6	309.1	317.9
Continental Extra	77.3	71.8	274.2	266.1
Ozark Flightime	53.5	63.5	231.1	242.5
PSA Magazine	122.3	116.8	438.3	444.8
Texas International/The Texas Flyer	63.8	59.6	241.7	210.0
United Mainliner	102.3	111.5	379.7	381.1
○Pace	20.0	20.0	37.5	37.2
Scene	25.2	—	102.4	—
Southwest Airlines	64.9	45.7	241.1	167.6
○Spirit of Aloha	—	—	54.5	32.2
USAir	40.9	—	133.0	—
Webb Publications:				
○Frontier Magazine	—	—	77.5	79.0
Passages	27.2	28.0	105.0	112.1
TWA Ambassador	51.9	45.8	192.9	179.2
Total Group	1,115.4	1,025.4	4,712.9	4,057.3
Metropolitan				
○Aloha	22.0	5.0	39.5	13.0
Atlanta	76.4	78.3	296.4	273.0
Baltimore	75.7	77.5	291.1	299.7
Bay Life	68.5	45.0	239.5	171.0
◇Bay Views	29.0	28.0	128.7	130.3
Birmingham	23.5	26.5	91.3	112.5
Boston	106.4	90.4	391.6	337.8
Broward Life	73.6	50.8	214.9	206.9
Brown's Guide to Georgia	59.0	40.0	151.4	162.0
Central Florida Scene	19.5	22.3	59.3	54.3
○Charlotte	—	—	44.7	40.6
Chicago	166.2	158.6	536.7	564.1
▲Chicago's North Shore	44.8	42.5	143.9	76.1
Cincinnati	57.7	67.3	247.0	212.1
Cleveland	72.2	107.1	289.6	318.6
Columbus Monthly	91.5	84.1	307.3	296.9
Commonwealth	13.0	21.2	59.0	75.0
Connecticut	64.5	67.0	258.3	286.6
D/Magazine, Dallas/-Fort Worth	119.1	98.6	397.7	365.6
Delaware Today	40.9	43.2	146.8	131.8
Denver Monthly	26.8	24.3	100.3	88.8
Monthly Detroit	47.7	47.2	157.1	143.2
Exclusively Yours Wisconsin	121.0	132.3	299.3	328.3
Gold Coast of Florida/-Indian River Life	128.2	122.2	532.5	491.0
Grand Rapids	38.1	32.3	127.2	92.7
Honolulu	77.8	80.9	281.3	277.6
Houston City	33.1	41.6	133.2	126.6
Indianapolis	31.4	26.0	145.7	109.8
Kansas City	28.8	45.6	113.2	127.2
Lansing	38.0	—	127.6	62.0
Los Angeles	201.0	207.0	717.8	744.5
Madison	26.5	21.7	136.0	90.5
Mesa	43.2	27.3	270.4	203.7
Miami	68.9	51.9	227.0	197.9
Mpls./St. Paul	73.0	74.9	271.4	191.9
Monterey Life	34.7	—	155.0	—
Nashville!	57.1	52.4	215.0	204.9
New Jersey Monthly	70.0	73.1	269.4	241.3
New Mexico	24.1	19.0	80.9	63.1
New Orleans	44.3	52.5	180.9	196.9
Ohio	22.0	37.9	101.5	161.3
Omaha	23.9	24.0	99.6	81.0
Oregon	16.9	22.3	69.6	87.4
Palm Beach Life	91.7	57.5	315.9	229.9
Palm Springs Life	140.5	126.5	635.0	560.5
Philadelphia	144.0	148.5	492.0	526.9
Phoenix	110.7	90.9	442.4	361.7
Pittsburgh	51.5	58.5	175.9	200.0
Pittsburgher	43.7	30.7	160.6	110.5
○Roanoker	—	—	88.8	97.0
SA, The Magazine of San Antonio	28.0	24.7	146.2	88.9
Sacramento	31.5	34.2	91.1	143.8
St. Louis	96.0	103.0	327.5	370.0
San Diego	177.0	174.3	578.4	582.4
San Francisco	74.5	50.5	223.3	193.2
San Francisco Focus	37.2	22.3	119.1	89.2
††Sarasota Town & County	36.0	40.0	164.0	92.0
▼Shenandoah Valley	—	—	75.0	—
Spokane	37.5	38.3	129.1	137.7
Texas Monthly	126.9	126.4	401.6	383.8
○Triad	18.0	33.0	35.0	61.0
Tucson	34.3	48.0	148.0	184.3
Twin Cities	26.9	22.9	96.5	64.8
Washington Dossier	55.0	44.0	180.0	169.0
The Washingtonian	124.0	127.0	437.0	466.0
Westchester	35.0	30.7	160.7	116.0
Westchester Illustrated	45.0	42.3	174.1	141.3
Wichitan	44.5	60.5	170.2	203.4
Total Group	4,111.4	3,904.5	15,116.0	14,014.8
Movie-romance-radio-tv				
○Complete Women's Group	26.0	29.7	49.0	55.7
Ideal Women's Group:				
Daytime Stars	27.5	30.6	86.6	89.1
Intimate Story	26.7	33.1	111.5	119.7
Personal Romances	26.7	33.1	111.2	119.9
D. Soap Opera	—	—	29.5	—
KMR Women's Group:				
Real Romances	17.8	16.7	45.8	57.6
Real Story	17.8	16.7	45.8	57.6
○Teen Bag	—	—	19.5	29.9
Macfadden's Women's Group:				
Modern Romances	29.2	31.0	120.0	135.4
Photoplay	32.8	35.0	99.9	124.6
Secrets	29.2	30.3	120.0	133.8
True Confessions	30.5	31.5	122.6	134.7
True Experience	29.2	31.0	120.0	134.4
True Love	29.2	31.0	120.0	134.4
True Romance	29.2	31.0	120.0	134.4
Sterling Women's Group:				
Daytime TV	32.8	32.5	125.0	127.5
Modern Love	29.6	31.5	61.2	123.6
Modern Screen	32.6	33.0	126.5	127.5
○Movie Mirror	—	—	63.6	63.5
Photo Screen	—	33.0	32.3	64.0
Real Confessions	—	92.1	93.4	123.6
TV Movie Screen	—	—	63.6	64.6
TV Picture Life	32.6	33.0	64.9	64.0
Total Group	479.2	635.8	1,953.9	2,219.5
Youth				
Boys' Life	29.2	28.6	88.7	89.6
Campus Life	29.7	28.5	153.0	111.4
††Scholastic Magazines	31.3	40.8	129.9	152.6
Total Group	84.2	97.9	371.6	353.6
Mechanics & science				
○Elementary Electronics	24.1	35.4	48.5	70.2
§Mechanix Illustrated	90.9	89.8	339.2	372.4
Popular Electronics	53.8	62.4	242.1	229.4
Popular Mechanics	139.5	143.2	467.6	488.9
§Popular Science	110.9	107.1	372.9	389.2
Total Group	419.2	437.9	1,470.3	1,550.1
Boating & yachting				
Boating	145.7	126.0	524.3	521.8
Chesapeake Bay	27.9	28.5	123.6	115.3
Cruising World	116.4	111.9	456.1	404.0
Motorboat	65.5	86.6	237.0	339.4
Motor Boating & Sailing	142.9	140.1	582.7	593.0
§Sail	141.3	156.9	577.8	604.1
§Sea	100.0	102.7	434.9	406.7
Trailer Boats	38.9	44.7	127.9	124.4
Yachting	194.3	195.0	757.1	842.6
Total Group	972.9	992.4	3,821.4	3,951.3

§Sectional linage included but prorated to circulation of regional editions. **Sectional linage included but NOT prorated to circulation of regional editions. †Published 6 times a year. ○Published every other month. ▲Published 10 times a year. ††Published 9 times a year. ‡Published 3 times a year. #Published quarterly. ☆Published twice a month. ‡‡Published 7 times a year. ◇Published 11 times a year. ▼Published 8 times a year. **Published weekly. ▶Published every two weeks. A. Figures reflect larger page size. B. Preprinted inserts included. C. Adjusted figures. D. Figures reflect corrected 1979 linage. E. Figures not available.

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